

## Position Description

**Created: June 2018 / Reviewed: January 2020**

<b>Position Title:</b>	Customer Accounts Officer
<b>EFT:</b>	0.8
<b>Department:</b>	Centre for Dementia Learning (CDL)
<b>Location:</b>	Parkville, VIC
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<b>Position reports to:</b>	Centre for Dementia Learning, Manager VIC / TAS
<b>Position supervises:</b>	nil
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### **Purpose of Position:**

- To work with the Scheduling Coordinator and Facilitator teams in coordinating the administration of consulting and Fee for Service (FFS) education program delivery.
- To prepare quotations and follow up reminders and invoicing for all FFS education program delivery and Consultancy sessions.
- To prepare documentation and monitor the progress of the consultation process.
- To prepare accurate and timely reports including preparation and management of finance, the statistics required to report on the progress and outcome of all FFS work.
- To provide administrative support to the Manager and Customer Relations Consultants.

### **Position Objectives and Responsibilities**

- Work with the Manager, Customer Relationships Consultant and Scheduling Coordinator in preparing proposals, quotations and follow-up reminders to clients and maintaining related database systems.
- Coordinate the administrative functions of the consultations and take responsibility for the monitoring, recording, and reporting of the consultation progress.
- Prepare invoices and monitor payments for all consultancy and FFS education program delivery services.
- Develop and maintain close working relationships with the clients of CDL, including liaising with clients to monitor the consulting process and FFS education program delivery services.
- Promote the Fee for Service work provided by Dementia Australia and follow up with potential clients in collaboration with the Customer Relations Consultants.
- Attend on and offsite meetings with Customer Relationships Consultant or facilitators as required.
- Prepare monthly and quarterly progress reports of consultancy services as required by Manager.
- Create and maintain database systems to ensure successful administration of consultation delivery.
- Participate in other team projects/activities relevant to the position.
- Prepare bi-annually reports on commonwealth / state department funding contracts as required.

	<ul style="list-style-type: none"> <li>• Prepare all organisational invoices for Fee for Service bookings, including general training, consultations and specialised presentations.</li> <li>• Prepare monthly and annual finance reports for the VIC CDL Manager.</li> <li>• Provide advice and support for Microsoft Word, Outlook and PowerPoint usage, provide standard document formats, and ensure that appropriate guidance is provided for VIC CDL staff.</li> <li>• Schedule consultation meetings on behalf of the Vic CDL Manager with internal or external parties.</li> <li>• Contribute to the development of policies and procedures for VIC CDL.</li> <li>• Contribute to the ongoing quality improvement of VIC CDL.</li> <li>• Provide reception back-up as required.</li> <li>• Provide support and back up to other Administrative Officers in CDL.</li> <li>• To work on special projects as directed by the VIC CDL Manager.</li> <li>• To work cooperatively and collaboratively with other CDL managers and staff to ensure satisfactory delivery of programs and services.</li> <li>• Other duties within the purpose of this position as directed by the VIC CDL Manager.</li> </ul>
<p><b>Communication &amp; Team Work</b></p>	<ul style="list-style-type: none"> <li>• Develop strong team relationships, fostering positive relationships within Dementia Australia, colleagues and across departments.</li> <li>• Collaborate with other team members to ensure integrated and coordinated approaches to addressing client needs.</li> <li>• Promote an awareness of the needs of people with dementia, and their carers from special needs groups including those from diverse cultural backgrounds, people who identify as being LGBTIQ, Aboriginal and Torres Strait Islander people, and people living in rural and remote areas, and develop culturally appropriate service strategies to meet individual needs and improve service access.</li> </ul>
<p><b>Administration and Documentation</b></p>	<ul style="list-style-type: none"> <li>• Ensure that client activity and other appropriate information is documented in line with professional and legal standards.</li> <li>• Ensure timely and accurate management of client information and utilise prescribed databases for the recording of client information and to report outputs to meet funding agreements.</li> </ul>
<p><b>Organisational Responsibilities</b></p>	<ul style="list-style-type: none"> <li>• Communicate and act in ways that are consistent with the organisation's values.</li> <li>• Support and promote the work of the organisation, maintaining a positive image of the organisation.</li> <li>• Apply and uphold the principles of a respectful, inclusive and diverse workplace, free from discrimination, harassment or bullying.</li> </ul>
<p><b>Policies and Procedures</b></p>	<ul style="list-style-type: none"> <li>• Adhere to, and comply with organisational policies, processes and procedures, using appropriate systems where required.</li> <li>• Model the organisation's values, play a role in raising the profile of these values and associated behaviours across the organisation.</li> <li>• Demonstrate a strong commitment to a quality culture, implementing standards of excellence and a continuous improvement business focus.</li> </ul>

- Support and promote a strong safety culture by ensuring all work activities are performed in compliance with the organisation's Work Health and Safety Policy.

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**Qualifications:**

Certificate IV or above in a Business related discipline would be desirable.

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**Experience, Skills and Knowledge:**

1. Experience as an administrative officer in the not for profit sector will be viewed positively.
2. Proficient intermediate to advanced skills in the MS Office Suite particularly Word, Excel, Outlook, and PowerPoint as well as Publisher.\*
3. Experience in a busy environment, with competing deadlines.\*
4. Demonstrated experience in a similar role.\*
5. Maintain a high level of written and oral communication skills including the ability to market the CDL programs and effectively communicate with staff, volunteers, and a range of service users.\*
6. Effective organisational skills.
7. Demonstrated ability and/or willingness to work as a member of a team, whilst also taking appropriate initiative.
8. Ability to prioritise workload demands and cope with pressure.\*

\* Key selection criteria

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**Conditions of Employment:**

- A six month qualifying period applies to all new incumbents.
- Salary packaging is available.

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**Additional Requirements:**

The (prospective) employee will be required to:

1. Maintain a current driver's licence in the relevant state. Access to and willingness to use own car (with reimbursement) for travel.
2. Provide evidence of entitlement to work in Australia, the maintenance of such entitlement being critical to continuance in the role.
3. Undertake a Police Check prior to being offered the position.
4. Be flexible in work hours at times to meet the reasonable demands of this position.
5. Be willing to undertake travel as may be required with the position.

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**Signatures:**

The employee's signature indicates:

- that the employee has read, understood and accepted this Position Description.
- that the employee is not aware of any condition (physical or psychological) which may negatively impact on his/her ability to carry out the duties as described.

**Employee:**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Manager:**

Name: \_\_\_\_\_

Date: \_\_\_\_\_